

CFAM7.1.2

Build and deliver customer service and customer care support



Overview

This is about building and delivering customer service and customer care support for key customers served by the organisation.

When taking on new key customers and continuously managing account structure, it is imperative that there is an internal sales infrastructure to deal with customer requirements on a day to day basis, which depending upon the individual accounts can be quite considerable. It is, therefore, important to ensure that there is an available resource to provide customer service, customer care and sales support.

The aim of this unit is, therefore, to encourage you to become an advocate in your own and your customer's organisation, providing good marketing/sales support through a detailed knowledge and awareness of the key components of delivering an effective customer service.

This unit is suitable for senior managers, key customer managers, and for SME's developing marketing/sales support for key customers.

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Performance criteria

You must be able to:

- P1 establish customer needs and expectations in respect of marketing/sales and customer service support and consider level of support and customer service provision required
- P2 balance customer needs and wants with the organisation's practices and available resources, in terms of human, physical and financial resources
- P3 evaluate the needs for technology support within the customer relationship and identify key software packages to aid effective marketing/sales support and customer service
- P4 identify any potential risks and barriers in implementing marketing/sales support and customer services programmes relating to providing key customer support
- P5 develop clear objectives relating to the provision of service for the customer account
- P6 develop a support and customer services plan, designed to support customer service requirements, including communications, relationship development, operational and monitoring processes
- P7 assess financial implications of provision of level of service
- P8 consult with other customers, team members and customer service teams on the level of support and facilities for support of key customer accounts
- P9 identify and nominate key internal support members who will be responsible and accountable for being the organisational point of contact for support and customer services issues
- P10 develop customer care programmes for the key customer, which clearly outline service provision, service standards and nominated organisational contacts in consultation and agreement with the customer
- P11 establish communication platforms for all stakeholders from both the organisation and the customer, in order to aid sharing of information
- P12 develop approaches for managing key customer and organisational information, including storing, retrieving and communication of information
- P13 develop joint customer/organisational support monitoring and evaluation processes, in order to monitor jointly the effectiveness of the relationship
- P14 evaluate and assess the customer relationship for possible risks, problems and issues and prepare contingencies for dealing with those problems should they occur
- P15 establish mechanisms for taking corrective action appropriate to customer needs
- P16 ensure a growth in sales through effective management of key customers

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Knowledge and understanding

You need to know and understand:

General knowledge and understanding

- K1 the different methods and ways of managing key customers accounts, including methods such as KAM
- K2 the buyer perspective, needs and expectations in relation to establishing key customer support
- K3 buying behaviour and the different phases of the buying decision making process, and the impact this will have on ongoing purchases by key customers
- K4 the concept of the value chain as a mechanism for identifying primary and support activities for the marketing/sales support/customer service function
- K5 the role of technology and various software packages that could be instrumental in delivery effective support and customer service to key customers
- K6 the various internal and external pressures on buying relationships and how this will impact upon support and customer services
- K7 the personal pressures put upon buyers within the customer organisation
- K8 how to set up plans for key customers, considering business and capability components, ensuring marketing/sales support/customer services functions deliver effectively
- K9 how to establish sales line reporting to support the customer relationship
- K10 how to set up key customer teams to enable support/customer service functions to operate effectively and efficiently to meet key customer needs
- K11 how to motivate the customer effectively, and impact positively upon the grow in customer expenditure
- K12 how to develop customer care programmes either generic or bespoke to meet customer needs and expectations
- K13 how to improve levels of marketing/sales support and customer service industry/sector specific knowledge and understanding
- K14 legal and regulatory frameworks within the industry in which the organisation operates
- K15 ethical issues relating to the management of key customers
- K16 available technological and software support for managing key customers
- K17 competitive issues impacting upon the management of key customers

Context specific knowledge and understanding

- K18 an awareness of the organisation's proposed sales strategy, plans and sales activity plans
- K19 the organisation's existing practices in relation to providing

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- marketing/sales and customer service support for key customers
- K20 available technology and software packages used to provide effective sales support and customer service
- K21 internal and external factors that might have a direct impact upon the successful management of key customers
- K22 limits of your influence and autonomy in the organisation and with customers
- K23 how to exploit the organisation's strengths
- K24 the overall contribution of marketing/sales support teams in providing effective customer service
- K25 the roles of other functional business departments in providing key customer support
- K26 potential barriers to marketing/sales success
- K27 the characteristics of support staff required
- K28 proposed budgets for managing key customer accounts
- K29 processes for reporting on the management of key customers
- K30 processes for monitoring and control of key customer accounts

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Additional Information

Behaviours

1. respond to customer needs and expectations in respect of marketing/sales support and customer service provision
2. proactively monitor and control the customer/organisation relationship at all times and response quickly to difficult situations
3. take the lead in inter-organisational liaison between the customer/organisation and ensure communications are effectively planned and defined, creating a common sense of purpose
4. provide broader stakeholder support and demonstrate commitment to the relationship
5. ensure all plans are communicated effectively to all stakeholders
6. assess the relationship for risk on an ongoing basis
7. consult the customer on an ongoing basis, about all aspects of the relationship in particular sales and customer service support
8. encourage joint customer and organisational initiatives in respect of marketing/sales and customer service support
9. deploy resources effectively
10. assess implications of actions on the part of the organisation
11. aid the growth in customer sales through effective key customer management
12. display the key attributes of a key customer manager
13. show an awareness of various technology and software programmes available to support support/customer service activities

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